

# Volunteer Management System Hours Admin Training Outline for Texas Master Naturalists

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## Hours Admin Training Outline - Reference: VMS Admin Guide

- I. Project Overview (Implementation Team, All Chapters converting, communications)
- II. Some terminology
  - a. Opportunities, VMS Web Portal, Surveys, eCoordinator, eRecruiter
- III. User ID's and Logging In (Admin requires Internet Explorer)
  - a. TMN VMS Website, Volunteer User ID and password; Admin (eCoordinator) User ID and Password, Logging in as a volunteer vs logging in as an Administrator
  - b. Brief discussion of the Help Desk and requesting help, Admin log in and changing the tab view to Volunteers (if necessary)
  - c. **Selecting your chapter folder** (Admin Guide page 5), Clear Filters
  - d. **Saved grids** to "TMN Standard"
- IV. Checking for New Volunteers in the VMS (Inbox) (page 40)
  - a. Move a volunteer from the Inbox to your chapter folder (page 28)
  - b. Edit a volunteer profile (page 54)
  - c. Changing a volunteer Activity Status (TPWD system wide) (page 56)
- V. Manually adding a volunteer; Not recommended – preferred method = Volunteer entry
  - a. Assigning a volunteer user ID and password (page 29)
- VI. Approving volunteer opportunities (depends on chapter duties) (page 44)
- VII. Approving posted hours (page 52)
  - a. The 45 day lock-out window
  - b. Monitoring for hours to be approved (page 52)
  - c. Entering hours for a volunteer using eCoordinator (create a log book entry) (page 53)
  - d. Correcting or deleting a log book entry (page 53)
- VIII. Checking for and updating milestones and certification/recertification (page 61)
- IX. Monitor Background Checks (page 57) – XXXXX-Admin2
- X. Miscellaneous tasks
  - a. Reports (page 43, 65)
  - b. Conversion Cleanup: update officers/committees, verify email address, historical hours verification (upload)
  - c. Transfers, Inactive Members (TMN definitions)
- XI. Who to contact for assistance:
  - a. Help Desk documentation
  - b. Log a ticket or email [tmnvms@gmail.com](mailto:tmnvms@gmail.com)
- XII. Summary and Questions